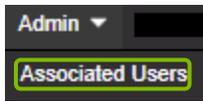




Providers with multiple office locations can associate a user’s login to multiple locations. Users can be assigned or restricted to specific roles to each location.

Admins can add or delete Associated Users. →



Add/Delete Associated Users

- Select Add.
- To delete, check the box next to the user and select delete.



Roles

- Enter the user’s web access code, postal code and email address.
- Select roles for the user and choose save.
 - Only roles approved for the agency will display.

Add Associated User

Web Access Code:

Postal Code:

Email Address:

Roles: eSign

- Agent Signs for Self and Insured in Non-Sign State
- Agent Signs on Behalf of Self and Insured
- Insured Signs First, then Agent
- Agent Signs First, then Insured
- Down Payment Via CC/Pay in Full
- Show 1st Invoice Button
- Admin
- Account Status
 - Online Payments
 - View Own Notes and Reminders
 - No Notes or Reminders Viewable
 - View All Notes and Reminders
- Reporting
- Quoting
 - Renewals
 - Hide Delete Bank Account Button
 - View Own Quotes Only
 - Allow Edit APR
- Down Payment Via ACH/Pay in Full
- Manages Webhook registrations and subscriptions

SetUp/Completion

An email with the subject, “Agent Association” will be sent to the associated user.

- To complete the association, the user will select the link in the email.

The user can now work with multiple locations based on the roles authorized.

★ You can edit roles for any user by clicking on the users login name.

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